

Attach completed schedule to your 2003 Utah income tax return

Taxpayer's last name

Taxpayer's social security number

Credit For Tax Paid To Another State**TC-40A** Rev. 12/03**Part-year residents rarely qualify for this credit. Nonresidents do not qualify for this credit. See instructions on page 10.****Part-year resident definition:** A taxpayer who is domiciled in Utah for part of the year and domiciled in a state, other than Utah, for part of the year, may only claim credit on the portion of income that: (1) is subject to both Utah tax and tax in another state, (2) was received while domiciled in Utah, and (3) was included in "Column A-Utah Income" on TC-40C. Also see "Part-Year Resident Defined" on page 2 of instructions.**NOTE:** You cannot file electronically if claiming credit for taxes paid to more than one state.**If you claim credit for tax paid to more than one state, complete a TC-40A for each state and enter the sum of the credits on TC-40, line 19.**

1. Federal adjusted gross income taxed in state of:	1	\$	00	Line 3 cannot be greater than 1.0000
2. Federal adjusted gross income from federal return (see line 4 instructions on page 5)	2		00	
3. Portion of other state gross income to total income (divide line 1 by line 2 and round to 4 decimal places)	3			
4. Utah income tax (line 16 on front of return)	4		00	
5. Credit limitation (multiply line 4 by decimal on line 3)	5		00	
6. Actual income tax paid to state shown on line 1. Part-year residents must prorate the tax paid to another state. The credit only applies to the portion of the actual taxes paid on income that was taxed in Utah and the other state shown.	6		00	
7. Credit for taxes paid to another state (line 5 or 6, whichever is less). Enter on TC-40, line 19.	7	\$	00	

Keep a signed copy of other state(s) income tax return for your records.**Retirement Income Exemption/Deduction****TC-40B** Rev. 12/03You qualify to take the retirement income exemption/deduction if **(1)** you *or your spouse, if filing jointly, are age 65 or older* at the end of the tax year; or **(2)** you *or your spouse, if filing jointly, are under age 65 and received qualifying taxable retirement income*. See pages 6 and 7 of instructions for definition of what is and is not qualifying retirement income.**1. Age 65 or older - Retirement Income Exemption**Check the "Self" box if age 65 or older
If filing jointly, check the "Spouse"
box, if spouse is age 65 or older☐ Self ☐ Spouse Total boxes checked _____ x \$7,500 = 1 \$ 00**2. Under age 65 - Retirement Income Deduction (if you and your spouse, if filing jointly, are age 65 or older, skip to line 3)***Line 2a is limited to qualifying taxable retirement income up to \$4,800 per retiree and can only be used by the retiree who earned the income. ATTACH ALL FORMS 1099R, SSA-1099, or other documentation to support your deduction.*

	Self	Spouse	
Date of birth ▶			
a. Qualified retirement income	a. \$	\$	
b. Retirement limitation	b. \$ 4,800	\$ 4,800	
c. Enter the lesser of a or b for each column.	c. \$	+	\$
Add "Self" and "Spouse" amounts on line "c." for total.			= 2 \$ 00

3. Total (add lines 1 and 2) 3 00

4. Adjusted income

a. Enter federal adjusted gross income (form TC-40, line 4)	a. \$
b. Enter any lump-sum amount (form TC-40, line 6, code 51)	b. \$
c. Enter non-taxable interest amount (federal form 1040 or 1040A, line 8b)	c. \$

Adjusted income (add lines 4a through 4c) 4 \$ 00

5. Enter: (a) \$32,000 - if married filing jointly, head of household, or qualifying widow(er)
(b) \$16,000 - if married filing separately
(c) \$25,000 - if single

5	00
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Round to nearest whole dollar.

6. Subtract line 5 from line 4 (if zero or less, enter zero) 6 00

7. One-half of line 6 (line 6 divided by 2) 7 00

8. Subtract line 7 from line 3. This is your retirement exemption/deduction. Enter on TC-40, line 12.
Do not enter an amount less than zero.

8	\$	00
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Non or Part Year Resident Utah Income Tax Liability

TC-40C Rev. 12/03

YOU MUST complete the worksheet below and enter the totals from line 28 of COLUMN A and COLUMN B below in the corresponding boxes on line 17 of your state income tax return. Enter the COLUMN A total in "Box a" and the COLUMN B total in "Box b" on line 17 of your return.

Complete columns A and B to determine your Utah income and total income.

Column A - UTAH INCOME AND ADJUSTMENTS

INCOME: Include all income/loss 1) earned or received from Utah sources while not a Utah resident; and 2) received while a Utah resident. This includes all pension, annuity, dividend and interest income received while a Utah resident, even if it is not from a Utah source.

ADJUSTMENTS: Enter the amount of each adjustment applicable to Utah income. This includes payments to qualified IRA or self-employed retirement plans, alimony paid while a Utah resident, moving expenses when moving into Utah, etc.

Column B - FEDERAL INCOME AND ADJUSTMENTS

The amounts entered in this column are income and adjustments from all sources, and are found on your federal return, as noted below.

ADJUSTMENTS: Enter the amount of each adjustment applicable to federal income.

	COLUMN A - UTAH		COLUMN B - FEDERAL	
1. Wages, salaries, tips, etc. (1040/1040A line 7, 1040EZ line 1)		00		00
2. Taxable interest income (1040/1040A line 8a, 1040EZ line 2)		00		00
3. Ordinary dividends (1040/1040A line 9a)		00		00
4. Taxable refunds, credits or offsets of state and local income tax (1040 line 10)		00		00
5. Alimony received (1040 line 11)		00		00
6. Business income/loss (1040 line 12)		00		00
7. Capital gain/loss (1040 line 13a, 1040A line 10a)		00		00
8. Other gain/loss (1040 line 14)		00		00
9. IRA distributions (1040 line 15b, 1040A line 11b)		00		00
10. Pensions and annuities (1040 line 16b, 1040A line 12b)		00		00
11. Rental real estate, royalties, partnerships, S corporation, trusts, etc. (1040 line 17)		00		00
12. Farm income/loss (1040 line 18)		00		00
13. Unemployment compensation (1040 line 19, 1040A line 13, 1040EZ line 3)		00		00
14. Social Security benefits (1040 line 20b, 1040A line 14b)		00		00
15. Other income (1040 line 21)		00		00
16. Total income (add lines 1 through 15)		00		00
ADJUSTMENTS	COLUMN A - UTAH		COLUMN B - FEDERAL	
17. Educator expense (1040 line 23, 1040A line 16)		00		00
18. IRA deductions (1040 line 24, 1040A line 17)		00		00
19. Student loan interest deduction (1040 line 25, 1040A line 18)		00		00
20. Tuition and fees deductions (1040 line 26, 1040A line 19)		00		00
21. Moving expenses (1040 line 27 - deduct in "Column A" only expenses from moving into or within Utah)		00		00
22. One-half of self-employment tax (1040 line 28)		00		00
23. Self-employed health insurance deduction (1040 line 29)		00		00
24. Self-employed SEP, SIMPLE, and qualified plans (1040 line 30)		00		00
25. Penalty on early withdrawal of savings (1040 line 31)		00		00
26. Alimony paid (1040 line 32a)		00		00
27. Total adjustments (add lines 17 through 26)		00		00
28. Subtract line 27 from line 16 for both COLUMNS A & B. COLUMN B total must equal the FAGI amount on TC-40, line 4.		00		00